

Revealing the Ideal Vacation Trip

Marketing Outlook Forum
Boca Raton, FL

A collaborative research effort by:

American Express
Travel Industry Association
Edge Research

Research Objectives/Questions

- What is an “ideal vacation trip”?
- How close or far are various life stage groups to the ideal?
- How does the “ideal trip” differ across life stages?
- What are the gaps, and how can industry marketers address these?
- What is the best way to reach these groups with our messages for maximum impact?

Research Design

Phase One: Qualitative

- Three, online qualitative discussion boards (QualBoards) with three age cohorts:

- Young Travelers (21-39)
 - Middle-Aged Travelers (40-59)
 - Older Travelers (60-79)
- **Each QualBoard was 3-days in length. Approximately 15 respondents participated in each.**
- **All participants were screened to ensure qualification in the study:**
 - Vacation travel decision maker
 - Taken a trip within past 12 mos.
 - Planning a trip in the next 12 mos.
 - Vacation trip of 3+ nights, at least ¾'s paid accommodations
 - Mix of income, education, gender, activities, type of vacation travel and vacation activities.
 - Not employed in the market research or travel-related industry

Phase Two: Quantitative

- **25 minute online survey of 2503 respondents**
- **All respondents recruited from a nationally representative online survey panel, and screened to determine eligibility.**
 - Must have taken at least one vacation trip (2+ nights) in the past year that included air travel, paid lodging, and/or was a cruise.
 - Not employed in the market research or travel-related industry
- **Data are weighted to ensure that the end-sample of vacation travelers was derived from a representative sample of U.S. residents using the most recent census statistics.**
- **Overall survey results have a margin of error calculated at $\pm 2\%$ at the 95% confidence interval. Margin of error for subgroups is higher.**

Profile of current vacation trips

American Vacation Travel Profile

Avg. # vacation trips/year	2.9
Avg. # vacation trips by air/year	1.3
Avg. # vacation trips with hotel/year	2.3

Took cruise in past year	11%
Took international vacation trip past year	24%

Most Recent Vacation Trip

Avg. # in travel party	4.1
Avg. # from household	2.4
Avg. miles traveled (one-way)	1183
Total Spend By HH Members	
Mean	\$1478
Median	\$1000

American Vacation Travel Profile (continued)

Primary Purpose of Most Recent Vacation

Spending time with your spouse/partner/family	26%
Rest and relaxation	20%
Visiting friends/relatives	16%
Celebrating a special event	9%
Entertainment	7%

Top Destinations Most Recent Vacation

City/Urban Area	39%
Small Town/Rural Area	26%
Ocean Beach	23%
Theme/Amusement Park	10%
Mountain Area	10%

Traveled With

My spouse/partner/significant other	62%
My children under age 18	20%
Friend(s)	17%
My parents	11%
Other family members	11%
Traveled alone	11%

American Vacation Travel Profile (continued)

What is an ideal vacation trip?

Ideal Vacation Trip Characteristics

Comparing Ideal Vacation Trip To Most Recent

	Ideal	Recent	Gap
<u>Primary Purpose</u>			
Spending time with your spouse/partner/family	26%	26%	0
Rest and relaxation	26%	20%	-6
Adventure, fun and excitement	10%	4%	-6
Visiting friends/relatives	3%	16%	13
Celebrating a special event	2%	9%	7
<u>Top Destinations</u>			
Ocean Beach	50%	23%	-27
City/Urban Area	28%	39%	11
Mountain Area	26%	10%	-16
Small Town/Rural Area	25%	26%	1
Forest/Woods	17%	7%	-10
Lake Area	16%	8%	-8
Theme/Amusement Park	13%	10%	-3
International Destination	48%	14%	-34
<u>Travel With</u>			
My spouse/partner/significant other	79%	63%	-16
Friend(s)	24%	17%	-7
My children under age 18	21%	20%	-1
My adult children age 18+	15%	10%	-5
Other family members	10%	11%	1
My parents	9%	11%	2

Ideal Vacation Trip Characteristics (continued)

Comparing Ideal Vacation Trip To Most Recent (continued)

Motivational Factors: Factor Analysis revealed 10 over-arching attributes of the ideal vacation trip.

Motivational Factors: These move from the more fundamental and universal, to more advanced/niche motivations.

Theme/R&R: Overarching, #1 benefit people want out of travel.

Theme/R&R: There are nuances within the R&R category.

Theme/R&R: In the qualitative phase, the various cohorts

expressed R&R in different ways.

- Younger Group: Chilling Out!
 - *I like to spend some time at a spa. If I am near a beach, I like to spend some time in the water and then **just lying in the sand. I like to sleep later.***
 - *For me, relaxing means **sitting back and doing as few things as possible.***
- Middle Group: Idealized being on a deserted island/escape life's responsibilities.
 - *Sitting on a **secluded island** ... I can almost feel the warm breeze and my toes in the sand. There would be **no time clock to punch** and I would just feel totally relaxed.*
 - *It's the whole **Swiss Family Robinson fantasy vacation** (minus pirates, of course). No schedules, **no links to the world outside, no pressures.** Now **THAT** would be a vacation.*
- Older Group: The ability to do what you want, when you want. Less about "Escape From" than "Traveling To" a new place/experience.
 - *For us a relaxing time is one that isn't overly scheduled. We like to **play it by ear and not plan too much.***
 - ***Travel for me is always to somewhere, never getting away.** I understand wanting to escape a hectic or pressure filled life to unwind for a while, but we are retired. Everyday is Saturday!*

Theme/Togetherness: "Togetherness" is a theme that emerged across the data set – but it has to be with the right people. Much travel is obligatory.

Theme/Togetherness CASE STUDY: Omni Hotels promotion:

"Run From the Relatives."

Perspectives on Togetherness: Each cohort talked about their desire for alone time with their Partner, but in slightly different ways. At the same time, there is some guilt associated with this among those who have kids.

Aspirations:

- **Romance** - *hopefully me and hubby can get a few hours to ourselves. Its very hard with work and the kids when you are home. (Young)*

- ***Togetherness***, because it's **good for a husband and wife to renew their love and friendship with each other far away from the everyday obligations and duties**. Get to know each other again. (Middle)
- The major theme seemed to be **time for ourselves and to re - connect**. (Older)

Obligations:

- I feel somewhat **sad** as we will **never have as much of an active and self-oriented type of vacation** in the future as we do now. (Younger)
- My husband and I did not have the ample time to explore the Island and go as we would of liked to on our own. It may sound like we were **being selfish**, but we always had our children with us or grand- children every where we went on vacation. **We wanted to just try it by ourselves**. (Middle)

Theme/Exploration and Discovery: There is a much wider gap on Sightseeing -- a key manifestation of Exploration and Discovery -- than other key trip purposes.

Theme/Exploration and Discovery: Exploration and Discovery is about new experiences that enrich your life. In addition to Sightseeing, there is a strong interest in History/Heritage and Fine Dining/Culinary.

Theme/Exploration & Discovery: The data reveals that the actual planning is part of the discovery process. Marketers should not lose sight of the research and planning, as it has its own intrinsic value.

How close (or far) are various life stage groups to the ideal?

LifeStage Groups

Current Trip Satisfaction: Older travelers are most satisfied; those in the thick of family life with lower incomes, the least.

Path to the “Ideal”: These same subgroup differences hold as you look at life-stage groups across a continuum to the “ideal” vacation trip. They also tell you something about the various cohorts’ receptivity to marketing messages.

How does the “ideal” evolve and change across lifestages?

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Barriers to the Ideal: Finances are the biggest barrier to taking one’s ideal vacation trip – this is consistent across life-stage groups.